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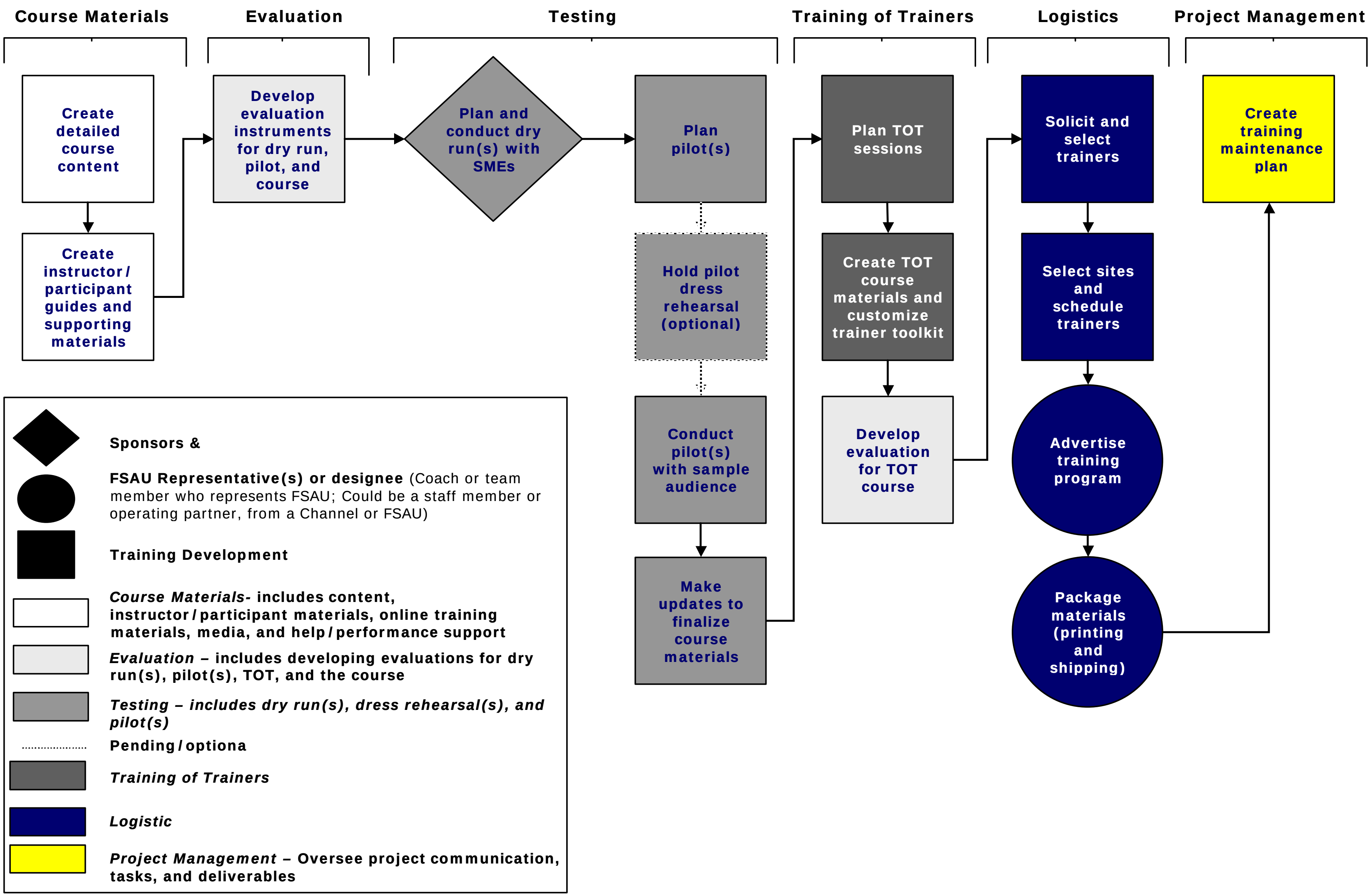
Build Phase Flow Chart



Build Phase Overview

This overview lists the Build phase inputs and outcomes necessary to develop training that is relevant, interactive, engaging, polished, and supported. Refer to the overall process checklist for additional context.

Inputs

What are the necessary inputs to complete this phase?

- ❑ Instructional design plan (includes content outline and storyboards)
- ❑ Evaluation strategy
- ❑ Logistics checklist

Description/Explanation

What are the components of the Build phase?

- Throughout this phase, the communications and marketing approaches are developed and implemented.
- At the beginning of this phase the instructional design plan is used as the blueprint to create the detailed course content for the training materials.
- The participant, instructor, media, and support materials are then created.
- Evaluations are developed from the evaluation strategy for the dry run, pilot, TOT, and training course.
- A dry run is held to review the first draft of the materials for technical accuracy. This is a thorough walkthrough of the materials by the SMEs.
- A pilot is held to model the final draft of the training materials. The participants of the pilot are members of the training audience. (Often, a rehearsal is held before the pilot to make the pilot more polished and increase the quality of feedback.)
- Feedback and suggestions are compiled and prioritized. The development team makes the appropriate changes and submits it to the stakeholders for final sign off.
- Training of Trainers (TOT) sessions are planned and materials gathered.
- Trainers are solicited and scheduled at specific sites accordingly.
- The final course materials are sent to the printer.
- A training maintenance plan is created.

Outcomes

What are the outcomes of this phase?

- ❑ Course materials
- ❑ Evaluation tools and methods
- ❑ Completed testing (dry run and pilot)
- ❑ Training of Trainers (TOT) materials
- ❑ Prepared training logistics (trainers and sites selected and scheduled, program advertised, materials packaged)
- ❑ Training maintenance plan

Create Course Materials

What are course materials?
The course materials are developed from the instructional design plan and the detailed course content. They may be paper-based or online and may include:

- Detailed course content
- Instructor/facilitator materials (guides, speaker notes, etc.)
- Participant materials (guides, artifacts, etc.)
- Online training materials
- Media (PowerPoint presentation, video, graphics, audio, animation)
- Help/performance support processes (help desk, job aids, etc.)
- Mementos (takeaways)

Develop and format standards for course materials
Defining templates early allows developers to concentrate on content rather than format. Use the FSAU standard templates to ensure consistent materials from the start, saving time later trying to make the materials appear consistent.

What is detailed course content?
Instructional designers use the instructional design plan (content outline and storyboards) to create the *detailed* content that will be included in the course materials. During the Design phase, the content is grouped into similar concepts, or course modules. When creating detailed course content, it is helpful to create manageable parts of content at a time. Training modules should include content for some or all of the following components:

Objective	Explains the objective in terms instructors/participants can understand.
Skill check description	Describes what participants will have to do to demonstrate mastery of the objective and where the objective fits in the overall scheme of the course.
Instruction	Provides the instruction needed for participants to practice the objective.
Demonstration	Shows the participant how to perform the task(s) to complete the objective.
Practice	Indicates where participants will get the practice equipment (if any) or other practice items they will need and what to do with these materials.
Feedback/self check	Tells participants how to evaluate their practice/performance.

Instructor guide
The instructor guide documents the information required by an instructor to prepare for and conduct the training course. The level of detail included in the instructor guide may vary Generally, instructor guides include:

- Presentation notes for introduction and wrap up/closing of the course.
- Faculty notes and checkpoints explaining (at a more detailed level) the tasks and issues that should be covered.
- Special instructions for learning activities conducted during the course.

* See *F2B Instructor Guide* in the **Sample** appendix

Participant guide

The participant guide provides job-related tasks practice in the training environment. The participant guide reflects the content found in the instructor guide. Strong participant guides will:

- Ensure that all the critical information the participants need is in the participant materials.
- Include copies of audio-visual materials used throughout the course.
- Divide sections corresponding to course flow.
- Use an appendix for reference material.

* See *F2B Participant Guide* in the **Sample** appendix.

Media

Media refers to how information is delivered. This definition includes: Electronic text (PowerPoint), graphics, video, sound, and animation. During the instructional strategy session, a combination of media was selected to enhance the delivery of the training instruction. During the Build phase, once the content is well defined, the appropriate media is created.

The development of media requires collaborative work from different types of professionals. When developing media it is helpful to:

- Solicit SME and design team members to review scripts before the video enters production.
- Involve a member of the development team in decisions on acceptance of graphics. This helps ensure integrated content and design.
- Choose graphic artists who are familiar with FSA, if possible. This reduces the initial orientation time.

Help/performance support

Help/performance support refers to assistance the participant receives during and after training to complete a task. When participants perform a task infrequently, sometimes the sequence of steps is forgotten and reference materials may be necessary to complete the steps. Types of help/performance support:

Job aid	Quick reference materials for fast answers to common tasks and questions. Many varieties include: Checklist, flow chart, glossary, forms/worksheet, frequently asked questions (FAQ's) * See *Build a Job Aid* in the **Appendix.**
Policy and / or procedures	Contains standard business policy related to job tasks.
Online help	Textual support for computer systems. Provides explanations about system procedures and business processes.

Mementos (takeaways)

Mementos (takeaways) are reminders of the training course given to each participant at the beginning or end of the course. The issuance of memento items to all attendees at a training session/conference is normally not permissible. However, under some circumstances, a Federal agency may distribute "useful" items, e.g. a mouse pad with a list of customer service or help desk phone numbers. In this circumstance, the head of the agency must certify that this is an appropriate use of federal funds. Mementos should be selected when the Design phase is complete, which allows them to match the course design and intent.

* See *Use of Appropriate Funds for Gifts and Awards* in the **Appendix**

Develop Evaluation/Measurement Tools & Methods

Developing an evaluation instrument
In this phase evaluations will be developed for project dry runs, pilot tests, training of trainers as well as the training session. Be aware that in many cases the same evaluations will be used for more than one element of the training.

Evaluation instrument types:
Evaluations take a variety of forms and should occur throughout the training process.

- Formative evaluation occurs during the development process and allows the development team to assess the training design, materials and usability and make needed changes before the product is presented to the intended audience.
- Summative evaluation occurs after the training sessions have been completed and allows comparison across sessions.

Both formative and summative evaluations use the same tools. Some of the tools typically used are:

- One-on-one interview
- Small group interview/Focus group
- Single user reaction (A single person uses the material and their reactions are recorded for evaluation)
- Pre/Post testing
- User surveys

Which type is most appropriate to the situation depends on a number of variables. Typically, one-on-one interviews and single user tests yield outstanding information but are time consuming and costly to administer. Pre/Post testing and user surveys are effective in determining if the learning objectives are being met. However, they may not show areas needed for improvement. The best practice is to use one or more survey evaluation methods to determine if the session is on the right track.

Levels of evaluation:

1. Reaction – Determines whether or not the participants liked the course
2. Learning – Measures the effect of the training on the participant's level of knowledge, skills or attitude
3. Behavior – Measures changes to participant behaviors
4. Results – Measures the business impacts of the training and its effect over time

While it is easy to measure participants' reactions to training, it is more complicated to measure changes in behavior or performance. Measurement of participant reaction and learning can be conducted during or immediately following the conclusion of training. Measurement of behavioral changes and business impacts are generally conducted after some time has elapsed at the end of the training. Behavioral change/business impact measurements generally require input from sources outside the training environment, i.e. supervisor evaluations, data system productivity/error reports.

Designing course specific evaluations:
There are some basic principles to keep in mind when designing an evaluation.

- Create learning objective-specific questions
  - "Did you learn to print a report using a query?"
  - "Identify four Pell calculation methods"
- Use a consistent scale

  - 1-5 scales work well and provide a standard basis for analyzing the data (e.g. 1. Strongly Disagree 2. Disagree, 3. Neutral, 4. Agree, 5. Strongly Agree)
- Change/deviations from the scale should be clearly identified
- Consider creating a pre/post-test to measure the participant's knowledge of the learning objectives
- Keep questions brief (less than 25 words) to ensure participant's understanding
- Don't ask loaded questions
  - "~~Experts agree that diet and exercise are the keys to good health. Do you agree~~?"
- Ask one question at a time
  - Are you satisfied with the amount of time the instructor spent on each subject?
  - Are you satisfied with the kind of information presented by the instructor?
  - **NOT** – Did you like the instructor and was she/he well prepared?
- Avoid open-ended questions
- Include an opportunity for participants to comment

Remember that more than one evaluation will be used for the dry run and pilot sessions; ensure that the questions on each evaluation are not redundant. The course evaluation created for any session pilots and dry runs should also be used at training of trainers and during the actual session. This allows a comparison across the development cycle. However, if revisions are made to the session based on the dry run or pilot, confirm that all evaluation questions remain valid.

Planning:
In addition to creating evaluations, conducting the assessment and collecting the results require advance planning. Consider the following:

- If outside data is required (e.g. systems reports, supervisory input on performance), sources must be identified and provided with the information requirements.
- Will outside data be available in a format that can be used and interpreted with other course evaluations?
- Who will receive the completed evaluations?
- Who will tabulate the results?
- How will evaluations be collected at the end of the session?
- Will the evaluation source documents need to be archived?
- Who will archive the documents?

Ensuring that these and other issues are addressed at this phase avoids confusion over roles and responsibilities in the Delivery phase.

* See **Sample** appendix for dry run, pilot, train the trainer, and course evaluations.

Plan & Conduct Testing

Course materials must be thoroughly reviewed for accuracy and modeled for real audience members to be successful. Two tests occur during the Build phase: a dry run and a pilot.

The two tests differ by audience, timeframe, and review. The dry run is a material accuracy review with the SMEs after the completion of the first draft. The pilot is a model of the final draft of the training program, where participants are members of the intended training audience and key stakeholders.

Dry Run
During the dry run, the SMEs review the technical accuracy of the training materials. The development team and the SMEs walk through the training materials page by page to confirm that the materials are correct and to gather feedback to improve the training prior to conducting an external pilot. After the dry run is complete, the development team implements the revisions based on SME comments.

- The team lead completes the logistics checklist to secure space and materials for the dry run.
- Materials are be sent to SMEs ahead of time for review.
- SMEs complete an evaluation during the review that requests information about the accuracy of the content.
- SMEs are informed of the deadline for course changes after which no additional edits will be made.

Pilot
Pilot sessions demonstrate the strengths and the weaknesses of course activities and materials. During the pilot, the audience provides the presenters with a realistic course experience. During these sessions, the development team determines what portions of the course need to be revised. After completion of the pilot, the development team assesses and prioritizes the changes to be made before the final materials are sent to the printer to use at the training of trainers session.

A dress rehearsal makes the pilot more polished and increases the quality of feedback. Dress rehearsal participants do not critique the course design during the session, but rather act as a typical course audience. To ensure the readiness of the pilot, there should only be minimal changes between the dress rehearsal and the pilot.

- The team lead completes the logistics checklist to secure space and materials for the pilot(s)/dress rehearsal.
- A pilot is presented to multiple audience groups. It can be valuable to conduct one to three pilots. Holding pilots in the regional locations allows for a representative audience sample.
- The pilot team must keep the number of course observers to a minimum. The more observers in the classroom, the less representative the training is of an actual session.
- Maximize the benefits of the pilot implementation by involving key logistics personnel who will also be involved in the deployment of the training course.
- Two evaluations are used for the pilot sessions. One is completed as the pilot is running and one after it is finished. The one given during the class should request information about each activity in the course. The evaluation delivered after the class should be the real evaluation to be used after each delivery of the course. It should request information about more general course topics such as course content and delivery.

* See F2B Pilot Plan in the **Sample** appendix.

Develop Training of Trainers Course

The Training of Trainers (TOT) session uses the final course materials to prepare facilitators to present the training program. There are several components to this preparation, including equipping trainers with the tools and knowledge necessary to successfully lead a training session. Its primary goal is for trainers to be comfortable with their responsibilities. Specifically, the main elements of a TOT include:

- Provide a model of the training program (actual length of course)
- Explain the instructional design and intent of the course (half day)
- Prepare trainers in presentation techniques and content understanding (half day +)

If possible, recruit the instructors/coaches early to allow them to help deliver development and pilot tests. The TOT should be tailored to suit the needs of its audience, whether that means a focus on presentation techniques or a greater concentration on course content. Its timing should be shortly before training sessions begin. At the end of the session, the team lead will distribute the customized *Trainer Toolkit*. The *Toolkit* explains the roles and expectations of the training teams, processes for communicating with the rest of the team, and additional guidelines/suggestions.

Training Program Model
A foundation for preparing trainers is demonstrating the course as the design and development team intended its delivery. This requires TOT presenters (those who conduct the TOT session) with a strong knowledge of the training program, both in content and format. These presenters model the course as though the TOT attendees were a typical audience, which has the added benefit of allowing the TOT audience to understand the class as their course participants will experience it.

Instructional Design Explanation
Following the training program model demonstration, the training development team(s) presents a "behind-the-scenes" explanation of the instructional design. For this activity, the storyboards may be a useful tool to explain the overall purpose and intent of the course. Since TOT attendees have seen the course modeled, this activity allows them to understand its instructional strategies, which better prepares them for presenting the course themselves. As part of this explanation, the training design and development team(s) walks through the instructor guides with TOT attendees, elaborating on various elements of the course and answering any questions. This provides an opportunity for trainers to take notes, learn more details about the course content and instructional strategy, and resolve any questions or concerns they may have.

In summary, the instructional design explanation includes:

- Presentation of storyboards
- Distribution of course outline, with timeframes for each activity
  - Demonstration of slide show (or other presentation tools)
  - Review of participant guide
  - Review of instructor guide
  - Question and answer session with training design and development team(s)

Trainer Preparation

The final phase of the TOT is perhaps the most critical, as it allows trainers to practice the material they will teach during the course. Since trainers will have different preparation needs, it is valuable to offer them a choice of preparation opportunities. These activities may include:

- Discussion with subject matter experts to learn more about specific content areas
- Practice with equipment, such as overhead projectors, LCD projectors, VCRs, etc.
- Videotaping of practice presentations
- Coaching on facilitation tools and techniques, offering individualized assistance

Trainer Toolkit Template

How to use the toolkit:

The trainer toolkit is intended to serve as a guideline for the types of information to distribute to the trainers and delivery team. The trainer toolkit explains the roles and expectations of the training teams, processes for communicating with the rest of the training team, and additional guidelines/suggestions.

The toolkit should be customized to fit the unique needs of each training course. Each page requires additional detail and contact information. All pages should be adjusted or removed as necessary.

It is recommended to attach *Training Satisfaction Surveys*, *Trainer Reports*, and the completed *Training Sites and Training Schedule Template* to the toolkit so all information is located in one place.

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Toolkit Overview

Overview

The trainer toolkit explains the roles and expectations of the training teams, processes for communicating with the rest of the training team, and additional guidelines/suggestions for the trainers.

Review all sections of the training packet to ensure full understanding of the trainer's role and the roles of the team throughout delivery of the training course.

Follow the processes closely to ensure that improvements to the training course delivery can be made, unanswered training issues can be recorded, and analysis of the course can be performed. The analysis is shared with various groups; therefore, the timely and accurate submission of evaluations, reports, receipts, and outstanding questions is a must.

This toolkit should be considered a living document. Updates and edits should be distributed as needed.

Expectations, Roles, and Responsibilities

Overview

It is important to understand expectations involved in the training of X. It is equally important to fully understand what each trainer is responsible and accountable for. Should questions or concerns arise, contact the training lead, X.

Expectations

- Represent the Department in a professional manner
- Escalate issues to the training lead
- Be on time and prepared
- Be flexible

Roles and responsibilities

- Prepare/check room setup and laptops
- Distribute training materials as needed
- Conduct training session – never deviate from set training curriculum and schedule
- Offer to work with participants after class to ensure a thorough understanding of the materials – Instructors (not participants) should be the last to leave
- Thoroughly document participant attendance on registration sheet. Send to X
- Answer Ask-It Basket questions and document participant suggestions from each session
- Distribute and collect evaluations. Send evaluations to X
- Submit trainer report after each session to X
- Participate in weekly training team call
- Escalate any issues to the training team lead
- Read all emails

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Travel & Expense Policy

Procedure

Refer to the ED travel regulations when creating a procedure for each training course:

http://sfa.ed.gov/employee_services/travel/fy2002_travel.html
non-FSA employees: http://www.gsa.gov/travelpolicy

All Delivery Team members are responsible to make his or her own air, rental car and hotel arrangements through X.

- Travel center phone number (XXX)XXX-XXXX
- Hotel and rental car should be charged to the trainer's credit card and expensed
- A per diem will be provided to cover items such as meals, personal phone use, laundry, dry cleaning, etc.
- Receipts must be provided for all expenses not covered by per diem (such as hotel and car rentals)
- Receipts should be mailed to X each week

Contacts

Overview

Should questions or concerns arise, contact any a member of the delivery team. If the question cannot be answered immediately, the team members will direct you to the appropriate resources.

Training Development Team

TBD	Training Lead	XXX-XXX-XXXX	Tlead@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Development Team	XXX-XXX-XXXX	TBD@ed.gov
TBD	Operating Partner	XXX-XXX-XXXX	TBD@ed.gov
TBD	COR	XXX-XXX-XXXX	TBD@ed.gov

Scheduling and Logistics

TBD	Sched/Log	XXX-XXX-XXXX	TBD@ed.gov
TBD	Sched/ Log	XXX-XXX-XXXX	TBD@ed.gov

Metrics (Evaluations)

TBD	Metrics Specialist	XXX-XXX-XXXX	TBD@ed.gov

Communications and Sponsorship

TBD	Comm Lead	XXX-XXX-XXXX	TBD@ed.gov

Trainers

Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov
Trainer	Region	XXX-XXX-XXXX	TBD@ed.gov

How to Handle the Registration/Attendance Sheets

Overview

The following procedure will assist you in understanding how training rosters are to be completed and submitted to the logistics team. (There will be a different roster for each training audience.)

Procedure

Process Step	Who	When	What
1	Sched & Log	**Week Before Training Session**	• Create training session attendance sheet from LMS.
2	TBD	**Week Before Training Session**	• E-mail/fax training session roster to trainers. • If roster is not provided/inaccessible, please use a blank piece of paper to gather the information.
3	Trainer	**Day Before Training Session**	• Print training session roster.
4	Trainer	**First Day of Training**	• Confirm training session information (if it is not already provided in the roster): 1. Session 2. Location 3. Date 4. Trainers 5. Attendees
5	Trainer	**Everyday of Training**	• Take attendance. (Must have this data to populate into the LMS for participants to receive credit on their transcripts.)
6	Trainer	**After Training**	• Forward attendance sheets to FSAU logistics to enter into the LMS. • Send in Fed Ex envelope distributed at TOT along with evaluations and Trainer Report.

How to Handle Evaluations

Overview

All participants, following the completion of training, must fill out the corresponding training class evaluation. The following process details how the training class evaluations are to be handled and processed by the trainers.

Procedure

Process Step	Who	When	What
1	Trainer	**Last day of each training session**	• Enter the number of completed training evaluations on the training class roster.
3	Trainers	**Last day of each training session.** *Note: Send each training session's evaluations individually and on the last training day. Do NOT wait until all training sessions for the week have been completed.*	• Make a copy of all completed training evaluations. Keep these copies for 1 week to ensure their delivery. • Place completed training evaluations in the pre-addressed envelopes received during the Training of Trainers course, along with Attendance/ Registration sheets and Trainer Report. • If a preaddressed FedEx Envelope is unavailable: 1. Ship to: ***X*** 2. Shipping Preference: ***FedEx Priority*** ***(Arrives 10:30am next business day)*** 3. Bill to: ***X*** 4. Email Fed Ex Tracking Number to: X

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How to Handle Trainer Reports

Overview

The instructor completes a Trainer Report after each training session. It documents number of attendees, number of evaluations collected, and site feedback. It is also a forum for the trainer to reflect on the suggestions and evaluations received and/or special circumstances that occurred during the training event.

Procedure

Process Step	Who	When	What
1	Trainer	**After session**	• Document: 1. Number of attendees 2. Number of evaluations collected 3. Site/contact feedback • Document any issues that occurred during training
2	Trainer	**After session**	• Forward to X • Send in Fed Ex envelope distributed at TOT along with Attendance/Registration sheets and evaluations.

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Setting Up and Closing Down Checklist

Overview

To ensure an effective training experience, complete all items on the checklist. (Some parts in the "getting ready" section do not need to be repeated.)

Getting Ready

1. Confirm training location and date(s) ❑
2. Ensure the materials and equipment needed are available at the site ❑
3. Be thoroughly familiar with the trainer materials and organize them for easy reference ❑
4. Communicate with any co-trainers prior to training event ❑
5. Put together a "trainer kit" to have on hand at each training event. Suggestions include: ❑
   - Pens or pencils
   - Pencil sharpener
   - Tape
   - Stapler/remover
   - Hole punch
   - Scissors
   - Post-it notes
   - Blank diskettes
   - Travel clock
   - Band aids

Preparing the Training Room

6. Arrive at least X minutes early on the day of the training class ❑
7. Locate site contact if one has been identified ❑
8. Place course materials on tables ❑
   - Workbooks and other participant materials
   - Paper
   - Writing instruments
9. Set up all equipment ❑
   - Computers/LCD projectors
   - Easels
   - Flipcharts
10. Organize the room (adjust shades, curtains, and lighting) ❑
11. Arrange training enhancers/giveaways ❑

Closing Down

12. Collect evaluations ❑
13. Remain in the classroom until all participants have had their questions answered or documented ❑
14. Write trainer report ❑
15. Fed Ex to FSAU contact: ❑
    - Attendance/Registration sheet
    - Evaluations
    - Trainer Report
16. Gather extra materials and send to X if directed to do so (shipping costs can exceed the value of the materials) ❑

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Hints for Good Instruction

Overview

The following points will help to facilitate the training course effectively.

Procedure

1. **Arrive early and leave late**
   If available before and after class, there is more time for the individual needs of the participants. This time can be spent addressing a variety of issues:
   - Questions not directly related to the course content
   - Difficult situations
   - General concerns

2. **Encourage questions**
   Responding to questions NOW instead of LATER may prevent confusion - not only on the part of the questioner, but of other participants as well. Responses can serve as a review of key points and a reinforcement of learning. Finally, encourage participants' comments and integrate them into the presentation.

3. **Use the Ask-It Basket**
   Some participants may not want to disrupt the flow of the session by asking a question. Others may feel uncomfortable asking a question in front of the class. The Ask-It Basket should be in a visible location and should be checked after each break and lunch for participant questions. Questions should be answered that day if possible.

4. **Speak clearly and write legibly**
   Speak loudly enough to be heard at all locations in the classroom. This also keeps the overall energy level higher. Use phrases and letters that are big enough to be seen without straining.

5. **Be enthusiastic**
   Use comfortable gestures whenever possible to accent points of interest and keep eye contact with the participants.

6. **Use smooth transitions between topics/modules**
   Transitions provide:
   - Closure
   - A preview of upcoming material
   - Timing of upcoming topics and modules

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If the Worst Occurs

Overview

Sometimes even the "best" activity doesn't always work the way it was suppose to because the group completely misses the point or the case study went differently then it was supposed to. These "failures" can actually be major learning successes for the participants, if handled well.

Procedure

If a group activity does not work out the way it was intended:

- Tell the class how it was supposed to work out and that it normally does work out that way.
- Guide the discussion, getting their ideas, and bring out the originally intended learning points from their comments.
- Even if they got all the wrong answers and missed every point, you can still, by way of discussion, ensure that they learn what they should have learned.

If a group activity is longer or shorter than planned:

- Individually ask the people who are having trouble what the difficulty is. They may simply have missed an instruction or some small fact. If it turns out that most of the group is having related problems, stop the exercise, clarify the situation and what they are supposed to do, entertain questions, and then start again.

- If this is an activity that is crucial for the rest of the topic, allow extra time and plan to abbreviate on some of the later, more detail-oriented exercises.

- If things are taking more time than they should because the class is talkative, explain that time is limited. This is not usually necessary if the established time schedule is maintained.

- If there is extra time at the end of the day, introduce new material, discuss/debrief the day, or let the participants experiment with their new learning.

Develop Training Logistics

Overview
During the Plan and Design phases, a logistics strategy was determined, reviewed and updated. In the Build phase, training logistics are implemented. Training logistics is comprised of four major tasks:

- Solicit and select trainers
- Select sites and schedule trainers
- Advertise the training program
- Package materials (printing and shipping)

When implementing training logistics, refer to your logistical strategy and *Checklist for Workshops Template* from the Plan phase and work with the assigned FSAU Registration and Logistics point of contact.

Solicit and select trainers
A critical element of a successful training course is its trainers. To ensure the selection of skilled, knowledgeable, and competent trainers, it is important to employ a thorough solicitation and selection process. In the past, FSAU has utilized a large pool of trainers from FSA, operating partners and financial assistance personnel (non-federal trainers). Below is the suggested trainer solicitation and selection process flow:

- ***Establish a selection team***
  The development team and External Partners Manager determine who selects trainers.

- ***Define the selection criteria***
  To consistently and fairly select training candidates, the selection team develops selection criteria. The selection criteria includes: Content related knowledge requirements and facilitation skills.
  * See the *Selection Criteria* in the **Sample** appendix.

- ***Determine the estimated time commitment***
  The selection team determines the time commitment required of trainers for training, including course delivery time and preparation hours. The team also determines the number of trainers required to deliver the training series.

- ***Update the communication plan***
  Once the selection team is in place, determine how to solicit, announce and notify trainers and the appropriate people about the trainer selection process

- ***Design trainer application***
  An application is a way to screen the potential trainers. The application questions are designed to measure the criteria that the team determined the trainers should have.
  * See the *Application* in the **Sample** appendix.

- ***Solicit trainers***
  An invitation may be sent to the pool of potential trainers encouraging them to audition as trainers. The invitation includes a description of the training, trainer criteria and projected time commitments.
  * See *Recruitment Message* in the **Sample** appendix.

- ***Receive and review applications***
  Once the applications are received, the selection team screens each application for the selection criteria

- ***Schedule & hold auditions***
  If necessary, upon completion of the application review, candidates can be contacted to schedule auditions. The candidates receive audition requirements and expectations at that time. The auditions are designed to test presentation skills and the content knowledge of the candidate. For example, each candidate may be asked to prepare and deliver a 5-minute presentation on a financial aid topic. During the audition, the candidate's presentation style, content knowledge, and other skills may be assessed on an evaluation sheet.

- ***Select trainers***
  Once the applications and/or auditions are complete, the team gathers to make final selection decisions.

- ***Verify candidate availability***
  Before announcing selection decisions, the team checks with the candidates and their managers to ensure that the trainers can fulfill the time commitment involved.

- ***Communicate selection decisions and information to trainers***
  After the final selections are made, both selected and rejected candidates receive a communication informing them of the committee's decision. Once the candidates are notified of their selection, they receive information concerning the training of trainers (TOT) and other resources to assist them to deliver training.

Select sites and schedule trainers

The logistical checklist provides the requirements for selecting training sites. The development team works with the assigned FSAU Registration and Logistics point of contact and/or the operating partner, to select and secure sites. Using the *Training Sites and Training Schedule Template*, follow these steps:

1. Determine the availability of the Regional Training Facilities (RTF)
2. Determine black out dates for the training participants and trainers (ex: school registration periods, conflicting national and regional financial aid conferences, holidays and preferred trainer dates)
3. Utilize the FSAU training sites databases to determine appropriate training sites
4. Solicit recommendations of locations and training dates from trainers. *If this major deliverable is being outsourced to an operating partner, compile this information using the Training Sites and Training Schedule Template*
5. Contact training sites to discuss their interest, availability and the site requirements
6. If the dates that the training site is available differs from the availability of the trainer, negotiate different dates or different trainers
7. Obtain a written agreement/contracts with the training sites.
8. Update the *Training Sites and Training Schedule Template* (*this task can also be completed by the operating partner)*
9. Distribute the *Training Sites and Training Schedule Template* with the training team to ensure accuracy
10. Finalize *Training Sites and Training Schedule Template*, including back-up trainers for each training site

Advertise the training program
Advertising the training is a major deliverable that will have an impact on the training delivery. To complete this major deliverable, a training announcement must be written and submitted to the Communications point of contact.

Create a training announcement
The training announcement informs the intended audience about the training. The elements of a training announcement are:
- Name of the training
- Who should attend
- A brief summary description of the training including the topics covered
- Prerequisites, if any
- Location, dates and duration of the workshop
- How to register using the Learning Management System (LMS)

The assigned FSAU Communications point of contact will assist the team with completing this major deliverable and may have other ideas to market the training.

Obtain Departmental approval for training announcement
The FSAU Communications contact will prepare paperwork and send the training announcement through official channels, requesting approval from the Secretary's office. Approval must be obtained prior to posting on the web.

When the announcement is approved, the FSAU Communications point of contact will notify the project lead and transmit the training announcement to the Information for Financial Aid Professionals web page (IFAP) and the FSAU training web page. The Communications contact will create a "headline" for the training that will appear on IFAP and the Schools Portal. Training announcements are automatically picked up by FINAID-L and the NASFAA web site. The development team may determine other sources to advertise the training, such as financial aid list servers and through Financial Aid Associations.
* Samples of training announcements are in the **Sample** appendix.

Post training workshops to the LMS
Once the training announcement is complete, the development team will work with the FSAU Registration and Logistics point of contact to have the training posted to the Learning Management System. The LMS is the registration system used by FSA for registering its customers and employees. To post the training announcement, the following documents must be submitted:
- Registration System Template
- Finalized Training Sites and Trainer Schedule

The FSAU Registration and Logistics point of contact will inform the development team when the training imitative is open for registration through the LMS, by contacting the team lead. The registration process coincides with posting of the training announcement.

Obtain Departmental approval for training materials
The FSAU Communications contact will prepare paperwork and send training materials through official channels, requesting approval from the Secretary's office. Approval must be obtained prior to printing materials through GPO.

When the training materials are approved, the FSAU Communications point of contact will notify the project lead and the Logistics point of contact.

Print and Package materials
The FSAU Registration and Logistics point of contact coordinates the package of materials, which include printing and shipping. The following items must be submitted to begin the printing process:

- Notification that the materials have received Departmental approval.
- Four camera ready copies of the training materials (if printing from a CD-ROM the 2 camera ready copies and the CD-ROM)
- The *Request to Print Form*
- Finalized *Training Sites and Training Schedule Template* for shipping purposes.

Please note that once the camera-ready copy is submitted, it will be reviewed by a professional proofreading organization. Allow one business week for this process to occur. Also note that the printing contract allows for participant guide covers to be printed in two colors. If color covers are desired, you must submit a disk to the printing contact and allow an approximately 6 working days for the process. You may also designate the same two colors to be used for inside pages.

When the training materials are approved, they are submitted for printing. Types of training materials may vary for every training series. Inform the FSAU Registration and Logistics point of contact if additional training materials such as mementos, learning enhancers, posters, etc.

These completed deliverables are the foundations for the logistical support that occurs in the Deliver Phase.

Training Sites and Training Schedule Template

Course Name:

Date	Region	Name of Training site	Address of Training Site	Trainer Name(s)	Alternate Trainer	Shipping Address and Contact (If Different from Site)	Special Requirements /Notes

Registration System Chart

Complete this form and attach the "Training Sites and Training Schedule." Both of these forms contain the information needed to post a training course on the Learning Management System (LMS). Participants will not be able to register for the training course until this information is completed and returned to the logistics point of contact.

Factor	**Definition**	**Answer**
Course Name	What is the name of the training course?	
Project Lead	Who is the team lead(s) for the training course?	
Product Group	What kind of event is it?	
Available From	What are the start and end dates of the training course?	
Abstract	Please provide a brief description of the course.	
Maximum/ Minimum Count	What is the maximum/minimum number of participants allowed per class?	
Subjects	What keywords could be used to search the course catalogue to find this course?	

FOR LOGISTICS CONTACT PERSON ONLY

Materials mailed to:____on_____________

Tracking #________________

Need to order supplies (See Vicki):____

Contacted FSAU Communication to post class to Intranet site on:___________________________

Sent request to Vicki for LCs on ____

Sent request to Terry for Paid Hotel/School, etc. on ______________________________________

Other:

Create Training Maintenance Plan

Overview
A training maintenance plan is created prior to delivering the training. The purpose of the plan is to define a process and create accountability for updates to the training course. This includes the materials and the delivery format. Since a training maintenance plan may differ for each training session it is suggested that the development consider the list of questions below. The decisions made for the maintenance plan will be applied to the *Trainer Toolkit.*

Maintenance plan brainstorming questions
Communication

- Who is the point of contact for each area of delivery?
- Should an issue log be used to resolve problems? If so who will track and resolve the issues?
- What method of communication will trainers and the development team use to communicate? How often will the trainers and the development team communicate? *Suggested guidelines: The development team and trainers should communicate at least every two weeks during training delivery. The communication could be via conference call*, *electronic mail, weekly reports, etc.*
- How will questions that trainers receive be answered before, during, and after the training?

Course Materials

- Who will be responsible for updating the training materials if changes occur?
- How will the changes be implemented?
- Who will be responsible for distribution and informing the development team, the trainers, and the participants?
- What if a new policy or version of software is released?
- What will be considered a major revision and what would be considered a minor change or update?

Delivery Issues/Logistics

- Who will review the trainee and trainer evaluations and feedback?
- Who will collect and review the trainer evaluations, training evaluations and audience feedback to determine if changes are required? How often will the data be collected?
- What if trainers require additional coaching or mentoring after the training of trainers?
- How will trainers notify the training team of “hot spots” or problem areas with delivery?
- How will trainers submit suggestions or recommendations for training delivery and how will it be disseminated?
- What if a training site does not meet the requirements or an emergency occurs and the site is not available?
- What if a trainer can’t deliver the training? Who is the back up and how will they be notified? *Suggested guideline: A back up trainer was selected when the Training Sites and Training Schedule Template were completed. Ensure that the Trainer Toolkit provides contact information and procedures for these types of situations.*
- What is the cancellation policy for the course? What is the procedure to cancel a course? Who are the points of contact? *Suggested guideline: Within 14 days of the training session, if less than 5 participants are registered for an offsite course, cancel the training. If the course is in the Regional Training Facility (RTF), consult with the local trainer to determine if the course should be cancelled.*